

DEPARTMENT OF WORKFORCE DEVELOPMENT
DIVISION OF WORKFORCE SOLUTIONS
ADMINISTRATOR'S MEMO SERIES

NOTICE 02-17

ISSUE DATE: 07/26/2002
DISPOSAL DATE: Ongoing

RE: Financial Employment
Planner (FEP) to Caseload
Ratio

To: W-2 Agency Directors

From: Mary C. Rowin /s/
Deputy Division Administrator

Purpose

The purpose of this memo is to inform Wisconsin Works (W-2) agencies of the removal of the W-2 Performance Standard that places a limit on the caseload size of Financial Employment Planners. While the Department will no longer impose a mandatory FEP to caseload ratio, we encourage agencies to consider retaining the limits on their FEPs' caseload as a best practice measure.

W-2 Contract Amendment

Since 2000, the W-2 Contracts have required that agencies limit the size of each FEP's caseload. Based on the contract language, each FEP could have no more than 55 W-2 cash assistance cases and 125 total cases (including Food Stamp Employment and Training Program [FSET], Non-Custodial Parents [NCPs] and case management-only in addition to payment cases).

The 2002-2003 W-2 contract included the FEP to Caseload Ratio requirement in a W-2 Performance Standard that placed similar caseload restrictions on FEPs, requiring that they serve no more than 55 W-2 cash assistance cases and 125 cases overall. The decision has since been made to remove this from the Performance Standards for the purposes of Right of First Selection and Performance Bonus funding and use it solely for information purposes. In accordance with this change, the W-2 Contract is being amended. The rationale for this decision lies in the recognition that performance standards should be focused on participant outcomes rather than agency process.

Best Practices

The Department continues to see the value of limiting FEPs' caseload size as a means to ensuring appropriate case management. As a result, we encourage W-2 agencies to continue to limit the caseload size of FEPs to 55 W-2 cash assistance cases and 125 total cases overall.

In addition, agencies that require FEPs to carry an additional income maintenance caseload above and beyond the 125 case-limit, should consider the extent to which reducing these caseloads will improve service delivery to their work program customers as well as enhance the workers' efforts in achieving the established performance standards.

W-2 Monitoring

Currently, WebI Report 19 is available to monitor agencies' caseload size. The report will be used by both DWS central and regional office staff in conjunction with other outcomes reports to identify what impact a FEP's caseload has on their performance. In those cases where an agency is having difficulty meeting mandated performance standards, regional office staff will work with agencies to determine what, if any, action is needed to improve performance.

Contacts: DWS Regional Offices